

RDS Secure Web Site Registration & Application Process



RDS Secure Web Site Overview

- Primary communication link between Plan Sponsors the and RDS Center
 - Submit applications
 - Submit retiree files, payment requests, appeals
 - Maintain account information
 - Track status of applications and payment
 - Notifications from RDS Center



User Roles - Authorized Rep

- Authorized Representative (AR) Business Owner/ Officer or Trustee of Plan. Person ultimately responsible for all application(s) information. Required to agree/authorize compliance with RDS program requirements.
 - Chooses Account Manager
 - Authorized to perform all functions except establishing initial
 Plan Sponsor account and actuarial attestation
 - Must be employee of Plan Sponsor with authority (CFO, President/CEO, etc.)



User Roles – Account Manager

- Account Manager (AM) Authorized
 Representative delegates all account
 management tasks to this person. Authority to
 do everything for AR except sign the Plan
 Sponsor Agreement and actuarial attestation.
 - Establishes Plan Sponsor Account
 - Identifies the AR for the Plan Sponsor
 - Manages account and application process
 - For security reasons, AR and AM must be different people
 - May be employee of, or agent for, Plan Sponsor (HR director/manager, consultant, etc.)



User Roles - Actuary

- Qualified Actuary Member of the American Academy of Actuaries (AAA). Sign attestation of plan's actuarial equivalence to Part D.
 - Designated on each application
 - When combining benefit options, a Qualified Actuary must attest to the Gross Value of *each* benefit option, and a Qualified Actuary must attest to the Net Value of the combined options.
 - When NOT combining benefit options, a Qualified Actuary must attest to both the Gross and Net Value of each benefit option.



User Roles – Designee(s)

- Designees Assigned by AR or AM to perform specified functions.
 - Assigned on each application
 - Optional role
 - Assist filling out certain sections of the application
 - May be permitted to request payment, appeals
 - Cannot sign plan sponsor agreement
 - Cannot designate other designees



Registering on the RDS Secure Web Site



Starting the Process

- AR selects an AM
- AM comes to the RDS Center Web Site and requests ID, plan sponsor account, identifies AR
- AM and Plan Sponsor validated by RDS Center
- AM receives email indicating validation status
- AR receives email to visit the RDS Center Web Site with unique one-time link
- AR comes to RDS Center Web Site for ID
- AR validated by RDS Center
- AM (or AR) begins application



Create New Account Manager ID



Retiree Drug Subsidy Program

ABOUT THIS SITE

FA0s

HOW TO APPLY

EVENTS

NEWS

LAWS AND REGULATIONS

CONTACT

Print t page

SPECIAL ANNOUNCEMENT

Updated 9/02/2005

To All RDS Center Web Site Visitors:

Beginning today, retiree plan sponsors will be able to receive electronic approvals of their completed applications through the CMS secure retiree drug subsidy (RDS) web site - the site used by retiree plan sponsors to participate in the Retiree Drug Subsidy program created under the Medicare Modernization Act of 2003 (MMA). This announcement also addresses issues relating to the submission of retiree list files and an extension of the deadline for submitting retiree drug subsidy applications and retiree lists. CMS is urging retiree plan sponsors to submit their applications and retiree lists as soon as possible, and also urging sponsors to communicate now with their retirees to ensure that the retirees understand the coverage their retiree plan offers in relation to the information they will begin to receive from CMS in October.

Read more of this announcement... (> pdf, 27 KB)

The Centers for Medicare & Medicaid Services (CMS) recently published the final regulations for Title I and Title II of the Medicare Prescription Drug, Improvement, and Modernization Act of 2003 (MMA). Title I contains the provisions governing the special retiree drug subsidies and other options that were designed to encourage employers and unions to continue providing high quality prescription drug coverage to their retirees.

It is the goal of CMS to give employers and unions a comprehensive set of options to help them continue to provide high-quality prescription drug coverage. One method is through a retiree drug subsidy that is flexible enough to enable employers and unions to obtain the subsidy without disrupting their current coverage. To meet this goal, this web site serves as a comprehensive resource center for all informational and operational needs for plan sponsors to become a participant in the Retiree Drug Subsidy (RDS) Program. On this web site, many tools and resources are available to provide you with everything from general information about the RDS Program to specific instructions and assistance during the application period and afterward.

Together, with the full cooperation and involvement of our partners and plan sponsors who sign up to participate in the <u>RDS</u> Program, we can continue to make positive advancements towards providing access to prescription drugs, dependable retiree coverage, and better coverage options for millions of Americans.

ACCOUNT LOGIN â

>> CREATE A NEW ACCOUNT
MANAGER ID >>

ENTER LOGIN ID

ENTER PASSWORD

Login

Forgot Password?

Search

Events Calendar

SEP. 2005 SMTWTFS

1 2 3 4 5 6 70 8 9 10 11 12 13 14 15 16 17

18192021222324 2526272829**30**

Glossary

Reference Hub



Plan Sponsor Account Registration



RDS Secure Web Site

Plan Sponsor Account Registration

An asterisk (*) indicates a required field.

We ask for this information to protect and verify your personal identity, and that of the plan sponsor.

Plan Sponsor Company Name and Address fields must correspond with information associated with the Federal Employer Tax Identification Number (EIN).

*EIN	
*Company Name (must be the company name associated with the EIN provided above)	
*Business Telephone Fax	() ext.
Company Home Page	http://
*Type of Organization	Select One
Company Address	(must be the address associated with the EIN provided above)
*Street Line 1	
Street Line 2	
*City	
*State	Select One
*Zip Code	

YOU ARE HERE

- 1. Plan Sponsor Account Registration
- 2. Authorized Representative Information
- Account Manager Personal Information
- 4. Account Manager Login Information
- Account Manager Summary
- 6. Thank You

QUICK HELP

Help about this page



Help Convention





RDS Secure Web Site

105 Secure W	COBIC	
	https://www.rds.cms.hhs.gov - Plan Sp	YOU ARE HERE
Plan Sponsor Account Registration An asterisk (*) indicates a required field.	PLAN SPONSOR ACCOUNT REGISTRATION	1. Plan Sponsor Account Registration
We ask for this information to protect and verify your Plan Sponsor Company Name and Address field Tax Identification Number (EIN).	Print Close	3. Account Manager
*EIN 999999999 *Company Name (must be the company name associated with the EIN provided above) *Business Telephone (555) 555 55	correspond with information associated with the Federal Employer Tax	Personal Information 4. Account Manager Login Information 5. Account Manager Summary 6. Thank You QUICK HELP
Company Home Page http://	Identification Number (EIN).	Help about this page
*Type of Organization Commercial	In addition, you will be asked to read and accept the User Agreement and Privacy Policy (required). If you choose	
*Street Line 2 (must be the addre	Di Internet	
*City belair		
*State		

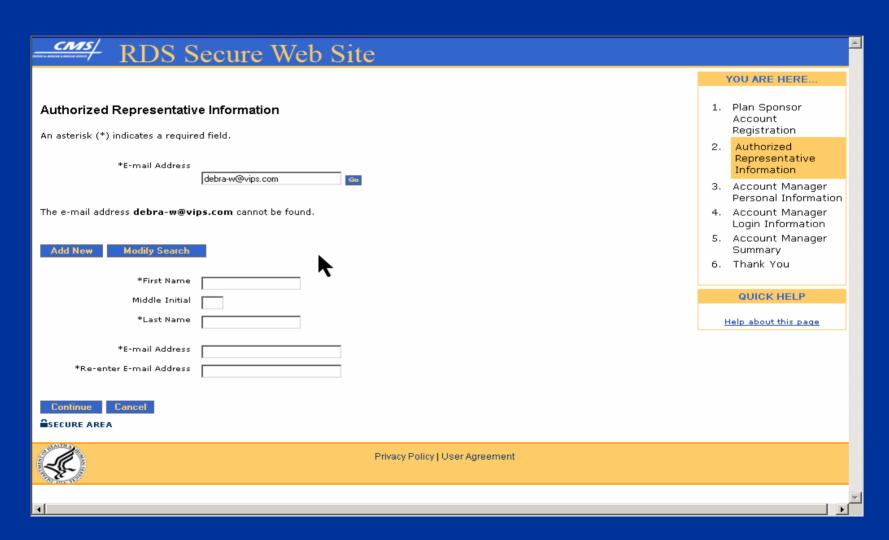


Help About this Page

PLAN SPONSOR ACCOUNT REGISTRATION Close About this page ... On this page you are being asked to provide identifying information about the Plan Sponsor. It is very important that this information is accurate, as it will be used to validate the existence of the organization. The Plan Sponsor Company Name and Address fields must correspond with information associated with the Federal Employer Tax Identification Number (EIN). In addition, you will be asked to read and accept the User Agreement and Privacy Policy (required). If you choose not to accept the agreement and policy you will not be able to continue with the registration process. If you would like to print the Use Agreement and Privacy Policy, a link has been provided. Once you have entered all the information into the required fields on this page, click the "Continue" button. Click the "Cancel" button to terminate the process. Data Fields on this Page ... Field Description Field Name Required Field EIN Enter the Federal Employer Tax Identification Number in this field. Required Field Company Name Enter the Company Name associated with the EIN provided above. Business Telephone with ext Enter the Main Business Telephone number for the Company Name provided above. Optional Field Enter the Main Business Fax number for the Company Name provided above.



Authorized RepresentativeInformation





Account Manager Personal Information



Account Manager Personal Information

An asterisk (*) indicates a required field.

We ask for this information to protect and verify your personal identity, and that of the plan sponsor.

*First Name	
Middle Initial	
*Last Name	
*Social Security Number	
*Date of Birth	Month ▼ Day ▼ Year ▼
*Job Title	
*Telephone	(ext.
Fax	()
*E-mail Address	
*Re-enter E-mail Address	
Mailing Address	
*Street Line 1	
Street Line 2	
*City	
*State	Select One
*Zip Code	-

YOU ARE HERE..

- Plan Sponsor Account Registration
- 2. Authorized Representative Information
- 3. Account Manager Personal Information
- 4. Account Manager Login Information
- 5. Account Manager Summary
- 6. Thank You

QUICK HELP

Help about this page



Account Manager Login Page





Account Manager Summary Page



RDS Secure Web Site

Account Manager Summary

Please review your information...

The following information will be processed:

Plan Sponsor Information

EIN: 99999999

Company Name: debs third test one Business Telephone: (555) 555-5555

Fax

Company Home Page: http:// Organization Type: Commercial

Company Address

Street Line 1: one west penn ave

Street Line 2: City: **bel air** State: **CO**

Zip Code: 99999

K

Account Manager Personal Information

First Name: **patrick**Middle Initial:
Last Name: **weber**

Social Security Number: 999-99-9999

Job Title: Accounting Manager

YOU ARE HERE...

- 1. Plan Sponsor Account Registration
- 2. Authorized Representative Information
- Account Manager Personal Information
- 4. Account Manager Login Information
- 5. Account Manager Summary
- 6. Thank You

QUICK HELP

Help about this page



Account Manager Thank You Page



RDS Secure Web Site



Thank You -- patrick weber (debstest1)

patrick weber, thank you for your interest in the Retiree Drug Subsidy Program. Your request for a Plan Sponsor Account has been submitted today. Please allow 8 business days for your request to be processed.

The following information is being sent for processing:

Plan Sponsor Information

EIN: 999999999

Company Name: debs third test one Business Telephone: (555)555-5555

Fax

Company Home Page: http:// Organization Type: Commercial

Company Address

Street Line 1: one west penn ave

Street Line 2: City: **bel air** State: **CO**

Zip Code: 99999

K

Account Manager Personal Information

First Name: **patrick**

Middle Initial: Last Name: **weber**

Social Security Number: 999-99-9999

Joh Title: Accounting Manager

YOU ARE HERE.

- Plan Sponsor Account Registration
- 2. Authorized Representative Information
- 3. Account Manager Personal Information
- 4. Account Manager Login Information
- Account Manager Summary
- i. Thank You

QUICK HELP

Help about this page

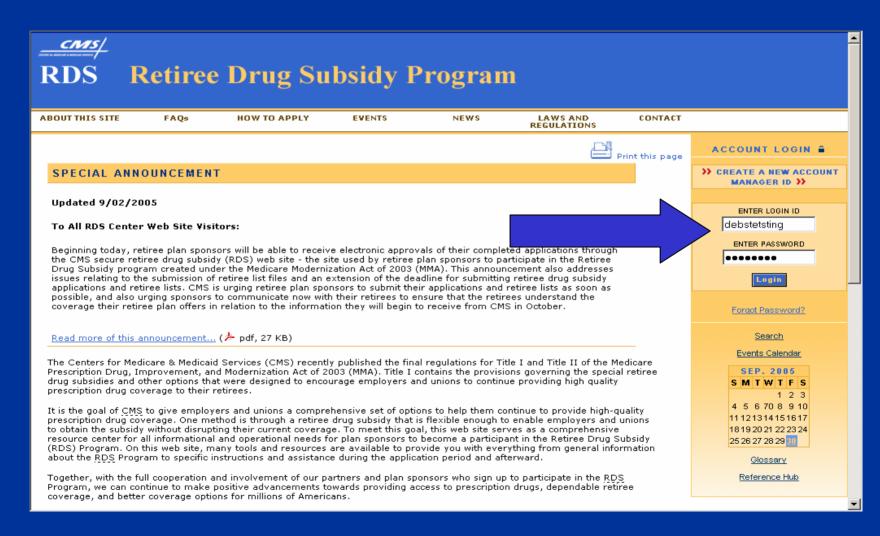


Next Steps

- RDS Center validates Plan Sponsor and Account Manager information
- RDS Center assigns Plan Sponsor ID and activates the Account Manager Login ID
- Email sent to Account Manager with link back to the RDS Center Web Site – 1 to 2 days after submission
- Email sent to AR to inform him/her of AM registration and invitation to register



RDS Secure Web Site Login





Account Manager Home Page





Submitting an Application

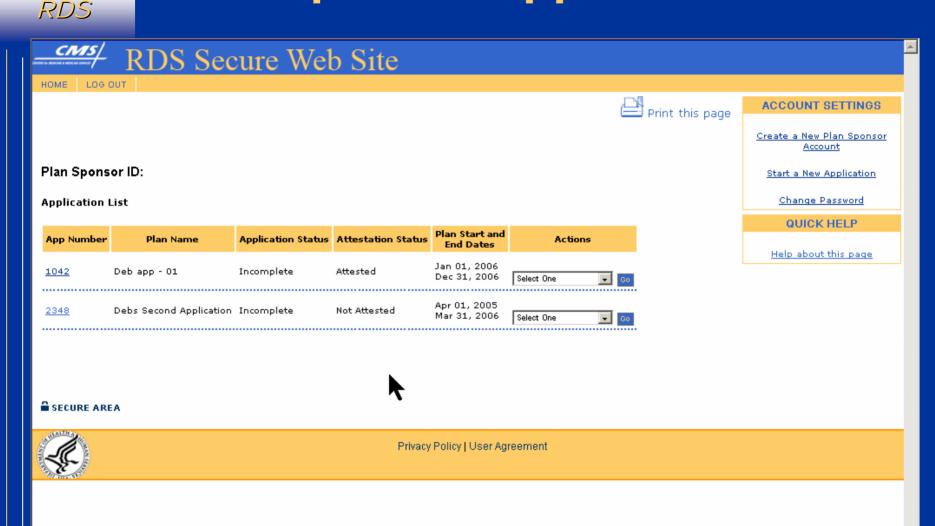


Start a New Application





Plan Sponsor Application List





Application Status



RDS Secure Web Site

HOME

LOG OUT



YOU ARE HERE:

Plan Sponsor ID: 1279 Company Name: Debs Testing Company Application ID: 2348

APPLICATION SECTIONS

Application Status

Benefit Option(s)

Assign Actuary(s)

Electronic Funds Transfer (EFT)
Info

Payment Frequency

Retiree List Submission Method

QUICK HELP

Help about this page

Application Status

Application Number: 2348 🔻 🙃

Plan Sponsor ID: 1279

Company: **Debs Testing Company**Authorized Representative: **Deb Weber**

Account Manager: James Weber

Application ID: 2348

Plan Name: Debs Second Application

Plan Start: Apr 01, 2005 Plan End: Mar 31, 2006

Application Start Date: Sep 06, 2005

Application Submitted:

	Application Section	Status
✓	Application Number Assigned	Complete
****	Assign Designee(s) (optional)	Incomplete
	Benefit Option(s)	Incomplete
	<u>Assign Actuary(s)</u>	Incomplete
	<u>Attestation</u>	Incomplete
****	Electronic Funds Transfer (EFT) Info	Incomplete
	Payment Frequency	Incomplete
	Retiree List Submission Method	Incomplete
	Upload Retiree List	Incomplete



Assign Designee(s)





Assign Designee(s)





Assign Designee(s)

Please choose the actions that th	ne designee can perform (check one or more) for this application.
Define Benefit Option(s)	
Assign Actuary(s)	
View Attestation Summary	
Complete Electronic Funds Transfer Information	
Define Payment Frequency	
Choose Retiree List Submission Method	
View/Send/Receive Retiree Data	
Submit and View Payment Data	
Withdraw Application	
Delete Application	
Request Extension	
Submit Appeal	
Continue Cancel	
	Privacy Policy User Agreement



PHI Disclaimer

Info *Last Name Jones Payment Frequency _ | U × | E-PHI Agreement - Microsoft Internet Explorer *F-mail Address lorie-b@vips.com Retiree List Submission Method E-PHI AGREEMENT *Re-enter E-mail Address lorie-b@vips.com QUICK HELP *Pass Phrase harley Help about this page *Re-enter Pass Phrase Print Close NOTE: The privileges ("View/Send/Receive Retiree Data" and/or Please choose the actions that the designee can perform (che "Submit and View Payment Data") permit the Designee to access certain Electronic Protected Health Information (E-PHI) Define Benefit Option(s) associated with this Plan Sponsor's RDS application, E-PHI is subject to protection under the federal privacy and security Assign Actuary(s) regulations established at 45 CFR Parts 160 and 164 and promulgated pursuant to the Health Insurance Portability and View Attestation Summary Accountability Act of 1996 ("HIPAA") and is intended for the access and use by individuals only as authorized by the Plan Complete Electronic Funds Sponsor, Disclosure of this E-PHI to any other party, unless Transfer Information authorized by the Plan Sponsor or required to do so by law, is Define Payment Frequency prohibited. Choose Retiree List Submission Method By clicking on "I accept" button below, you hereby authorize the View/Send/Receive Retiree Designee to access or use E-PHI associated with this Plan. Sponsor's RDS application, Clicking the "Cancel" button will allow Submit and View Payment Data you to modify the privileges that you want to assign to this Designee. Withdraw Application Delete Application Cancel Request Extension LAccept Submit Appeal



PHI Disclaimer





Designee Registration

 Designee will be presented with registration pages after following the link via email

Enter Pass Phrase

Sign the User Agreement and submit



Designee Personal Information

- Provide the following:
 - Name
 - SSN
 - Date of Birth
 - Job Title
 - Mailing Address
 - Telephone
 - Mailing Address
- Click on Continue button



Designee Login Information

 Enter user-defined Login ID and Password

Select 2 security questions and answers

Click on Continue button



Designee Summary Page

 Displays information entered for Designee

- Verify information
- Edit as needed

Click on Submit button



Designee Thank You Page

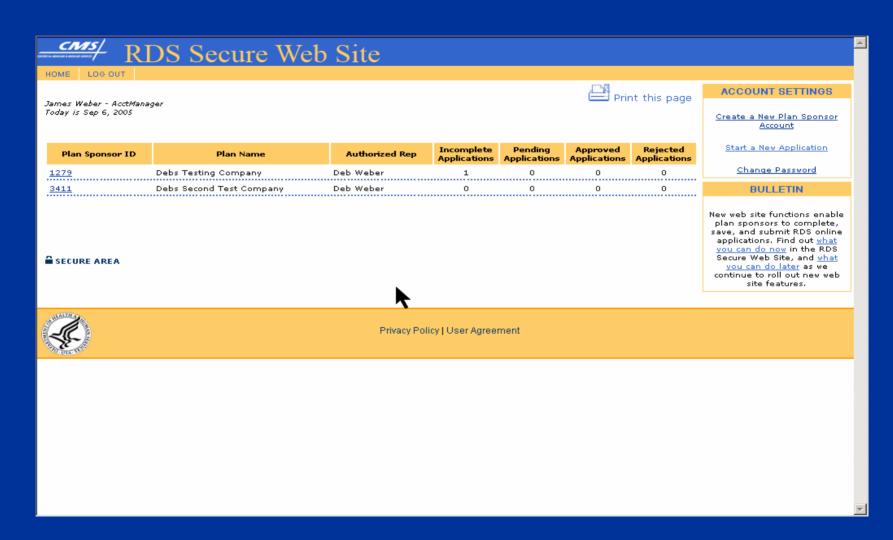
Displays information submitted by designee

Next Steps:

- RDS Center validates designee and activates designee Login ID
- Email sent to designee with link back to the RDS
 Center Web Site 1 to 2 days after submission
- Email sent to AR to inform him/her of designee registration



Designee Home Page





Application Status



YOU ARE HERE:

Plan Sponsor ID: 1279
Company Name: Debs Testing
Company
Application ID: 2348

APPLICATION SECTIONS

Application Status

Benefit Option(s)

Assign Actuary(s)

Electronic Funds Transfer (EFT)
<u>Info</u>

Payment Frequency

Retiree List Submission Method

QUICK HELP

Help about this page

Application Status

Application Number: 2348 🔻 🚳

Plan Sponsor ID: 1279

Company: **Debs Testing Company**Authorized Representative: **Deb Weber**Account Manager: **James Weber**

Application ID: 2348

Plan Name: Debs Second Application

Plan Start: Apr 01, 2005 Plan End: Mar 31, 2006

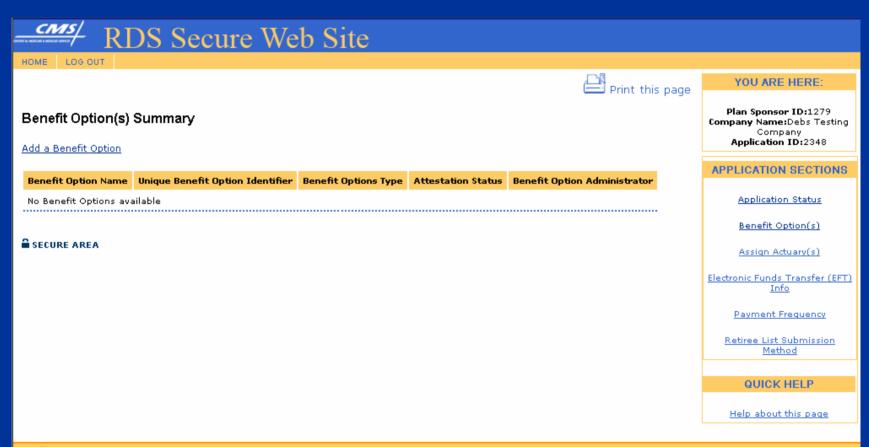
Application Start Date: Sep 06, 2005

Application Submitted:

	Application Section	Status
✓	Application Number Assigned	Complete
-	Assign Designee(s) (optional)	Incomplete
	Benefit Option(s)	Incomplete
	Assign Actuary(s)	Incomplete
	<u>Attestation</u>	Incomplete
	Electronic Funds Transfer (EFT) Info	Incomplete
	Payment Frequency	Incomplete
	Retiree List Submission Method	Incomplete
-	Upload Retiree List	Incomplete
-	Application Summary	Incomplete



Benefit Option(s)





Privacy Policy | User Agreement



Benefit Option(s)





Benefit Option(s)



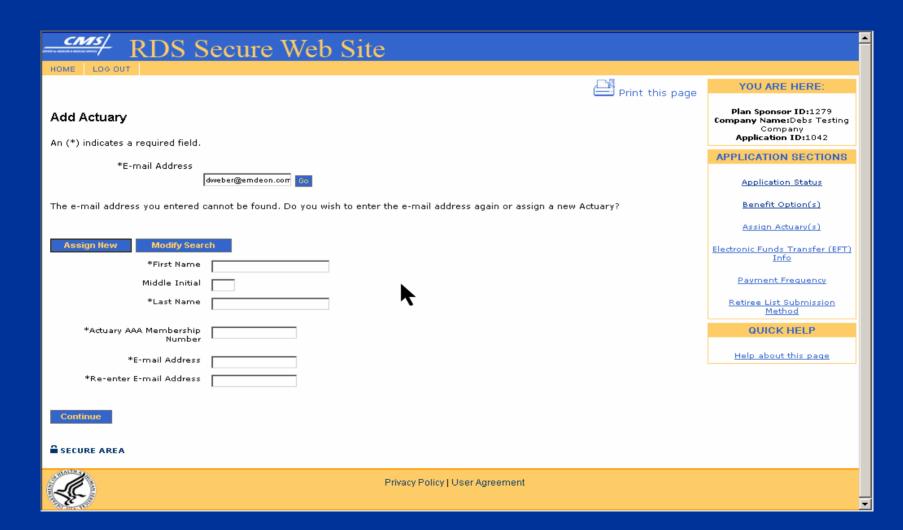


Privacy Policy | User Agreement





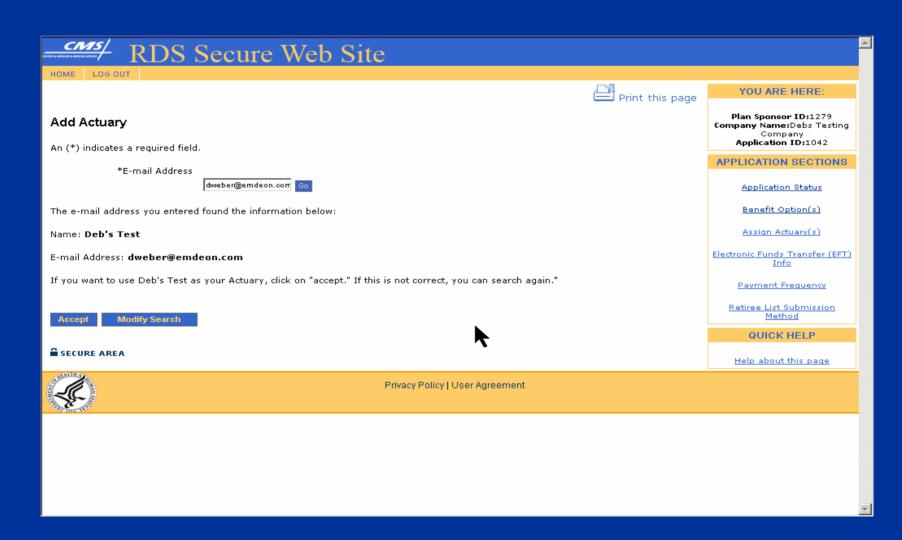






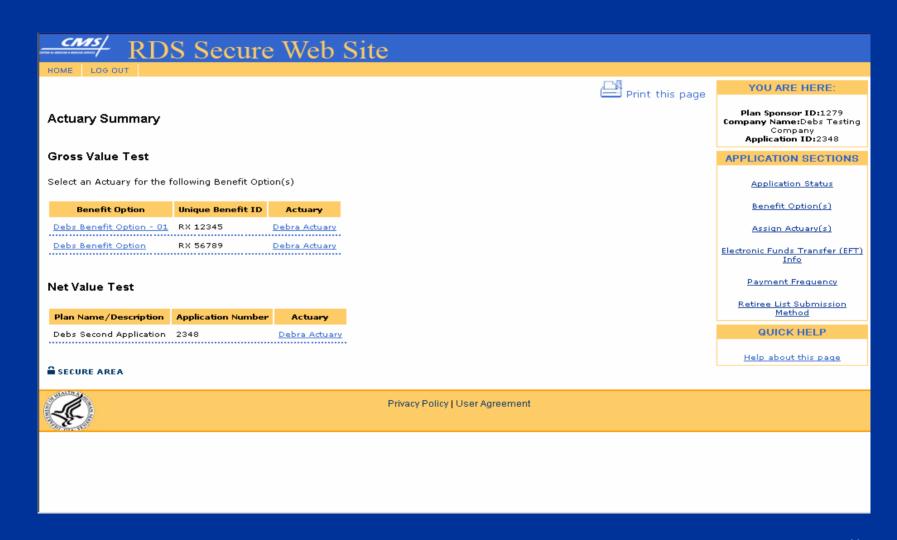








Actuary Summary





Actuary Registration

- If a designated actuary already has a RDS login ID, s/he will receive an email notification to provide attestation
- If a designated actuary does not have a RDS login ID, s/he will receive an email invitation to visit the RDS Web Site to obtain one via a secure link



Electronic Funds Transfer (EFT)

RDS

Electronic Funds Transfer (EFT)		
An (*) indicates a required field.		
Account Information		
*Bank Name		
*Account Type	Select One	
*Company Name Associated with Account		
*Account Number		
*Re-enter Account Number		
*Bank Routing Number		
*Re-enter Bank Routing Number		
Bank Contact		
*First Name		
Middle Initial		
*Last Name		
*Telephone	(ext.	
Fax	(
E-mail Address		
Re-enter E-mail Address		
Bank Address		
*Street Line 1		
Street Line 2		
*City		
*State	Select One	
*Zip Code		

Print this page

YOU ARE HERE:

Plan Sponsor ID: 1279 Company Name: Debs Testing Company Application ID: 2348

APPLICATION SECTIONS

Application Status

Benefit Option(s)

Assign Actuary(s)

Electronic Funds Transfer (EFT)
<u>Info</u>

Payment Frequency

Retiree List Submission Method

QUICK HELP

Help about this page



Payment Frequency





Retiree List Submission Method





Mainframe to Mainframe

Retiree List		Assign Actuary(s)
*Select Method of Submission	on.	Electronic Funds Transfer (EFT) Info
Upload file via the secure web site	О	Payment Frequency
Send file mainframe to mainframe via AGNS	⊙	<u>Retiree List Submission</u> <u>Method</u>
COB Voluntary Data Sharing Agreement (VDSA)	0	QUICK HELP
		Help about this page
Send file mainframe to main	nframe via AGNS	
For Plan Sponsors with an existing	g AGNS account and an existing connection to GHI, the setup will take 1 to 2 weeks.	
For Plan Sponsors with an existing AGNS account, but no existing connection to GHI, the setup will take 1 to 2 months.		
For Plan Sponsors without an AGI	NS account, the setup will take 2 to 3 months.	
Please complete the following Tec	chnical Contact Information so the RDS Center can assist you with the necessary setup. Please allow 2 to 3	business days for contact.
Technical Contact		
*First Name		
Middle Initial		
*Last Name		
*E-mail Address		
*Re-enter E-mail Address		



COB VDSA

Retiree List *Select Method of Submission Upload file via the secure web site Send file mainframe to mainframe via AGNS COB Voluntary Data Sharing Agreement (VDSA) Assign Actuary(s) Electronic Funds Transfer (EFT) Info Payment Frequency Retiree List Submission Method QUICK HELP Help about this page

COB Voluntary Data Sharing Agreement (VDSA)

If you currently have a VDSA, please ensure the next submission is received at the RDS Center to meet application-filing requirements.

If you do not currently have a VDSA and would like to get additional information, contact the CMS Coordination of Benefits (COB) Contractor at cobva@ghimedicare.com. The usual timeframe for completing the agreement and testing with the CMS COB contractor is 60 to 90 days for new agreements.

Continue Cancel

≜ SECURE AREA



Actuary Registration

Actuary Information

You have been assigned as an Actuary to the following plan:

Plan Sponsor Company Name: Debs Testing Company

Plan Sponsor ID: 1279 Application ID: 2348

To set up a Login ID for you to attest as an Actuary, please provide your American Academy of Actuaries (AAA) Membership Number.

*Enter your AAA number and click continue:

View and print the agreement below

User Agreement

THE FOLLOWING DESCRIBES THE TERMS AND CONDITIONS ON WHICH THE

You must read and accept the terms and conditions contained in this User Agreement expressly set out below and incorporated by reference before you may access the RDS Center Secure Website.

The RDS Center may amend this User Agreement at any time. Except as stated below, all amended terms shall automatically be effective 30 days after they are initially posted on the Site. This User Agreement is effective immediately.

Please check the following box:

I accept the User Agreement and Privacy Policy above 1. Actuary Registration

- Actuary Personal Information
- 3. Actuary Login Information
- 4. Actuary Summary
- 5. Thank You

QUICK HELP

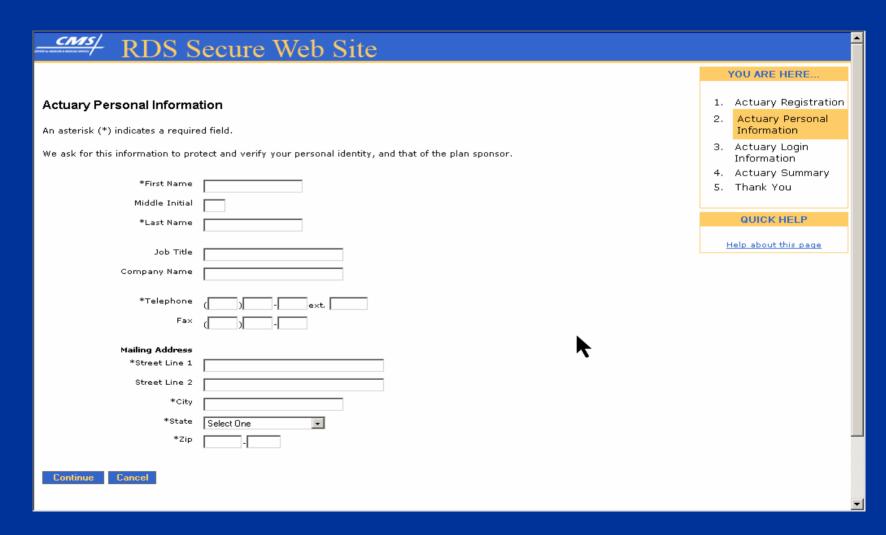
Help about this page

Continue

Cancel



Actuary Personal Information



Actuary Login Information

Actuary Login Information

An asterisk (*) indicates a required field.

We ask for this information to protect and verify your personal identity, and that of the plan sponsor.

Choose your Login ID and password carefully.

- Login IDs must be 8 to 15 characters
- · Login ID and Password cannot be the same
- · Password must be 8 characters in length
- · Password must be a combination of letters and numbers
- Password must be lower case only (do not use mixed case)
- Password cannot be a user's name
- Password cannot contain 4 consecutive characters from the previous password
- · Password must be different from the last 6 passwords



The Security Questions allow you to regain account access if you forget your password. Please note the answers you provide to these questions should be actual answers and not hints for your password.

*Security Question 1	What city were you born?	¥
*Answer 1	bishopville	
*Security Question 2	What elementary school did you attend?	•
*Answer 2	bishopville	

YOU ARE HERE...

- 1. Actuary Registration
- 2. Actuary Personal Information
- Actuary Login
 Information
- 4. Actuary Summary
- 5. Thank You

QUICK HELP

Help about this page



Actuary Summary Page

Actuary Summary

Please review your information...

The following information will be processed:

Actuary Personal Information

First Name: **Debra**

Middle Initial:

Last Name: Actuary

Job Title: **Debs Test Actuary**Company: **All About me**

Business Telephone: (999) 999-9999

Fax:

Business Address

Street Line 1: Main Street

Street Line 2:

City: Towson

State: MA

Zip: 99999

Actuary Login Information

Login ID: debsactuary

Security Question 1: What city were you born?

Answer 1: bishopville

Security Question 2: What elementary school did you attend?

Answer 2: bishopville

1. Actuary Registration

Actuary Personal Information

3. Actuary Login Information

4. Actuary Summary

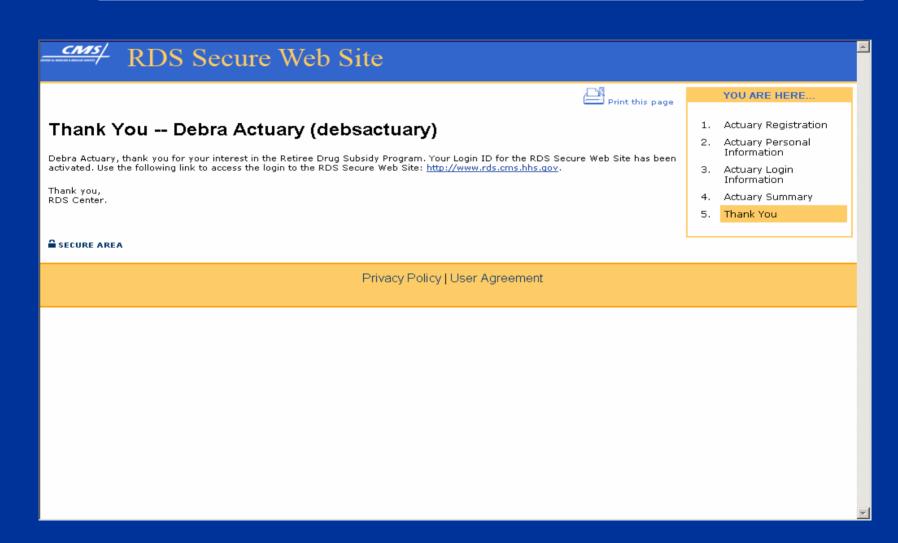
5. Thank You

QUICK HELP

Help about this page

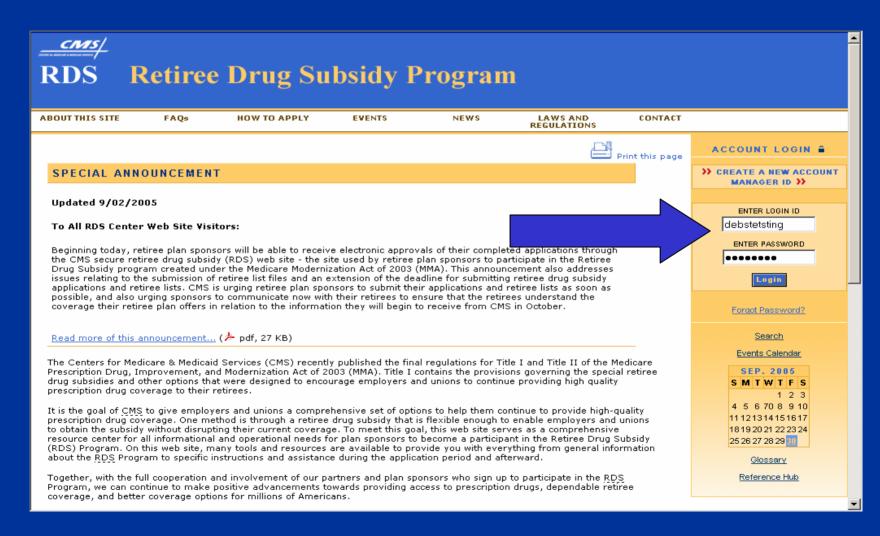


Actuary Thank You Page



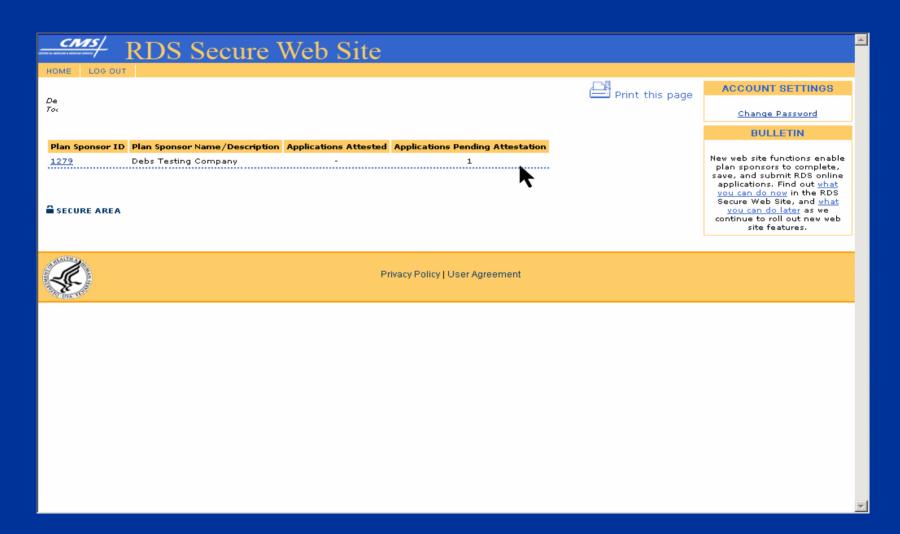


RDS Secure Web Site Login



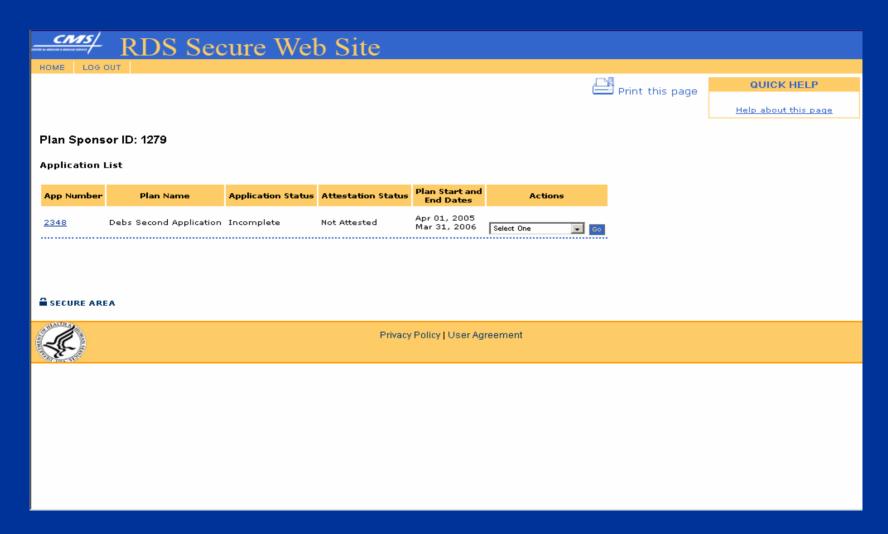


Actuary Homepage



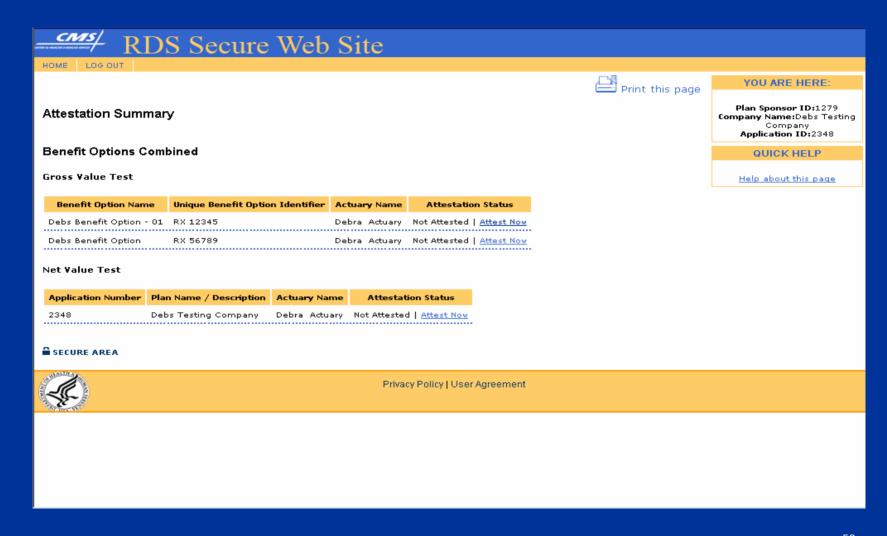


Actuary Application List





Attestation Summary





Attestation

RDS Secure Web Site HOME LOS OUT Print this page YOU ARE HERE: Plan Sponsor ID:1279 Attestation Company Name:Debs Testing Company Application ID:2348 Repetit Option Name: Debs Repetit Option - 01 QUICK HELP Unique Benefit Option Identifier: RX 12345 Benefit Options Type: Fully Insured Help about this page Actuarial Attestation for the Gross Value Test I hereby attest to the following: I am a qualified actuary and a member of the American Academy of Actuaries. I am familiar with the requirements for, and am qualified to prepare, a Retiree Drug Subsidy (RDS) Actuarial Attestation. The actuarial Gross Value of the benefit option(s) is at least equal to the actual Gross Value of the defined standard prescription drug coverage under Part D for the Part D eligible individuals who are participants and beneficiaries of the sponsor's plan for the subject plan year. The Gross Value of the option listed in section II(B) of this application was determined using a methodology consistent with the requirements set forth at 42 C.F.R. 423.884 (d)(5) and all relevant actuarial guidelines issued by CMS, and the data and assumptions used in the development of this attestation are reasonable and are based on generally accepted actuarial principles, including the appropriate actuarial standards of practice. I understand and acknowledge that the information being provided in this attestation is being used to obtain Federal funds. I agree to maintain and make available reports, working documents and other records as required under 42 C.F.R. 423.888(d). This includes information about data and/or assumptions I may have relied upon. I certify that this attestation is true and accurate to the best of my knowledge and belief. Attest Now Security Question 1 What city were you born? Security Question 2 What elementary school did you attend? *Answer 2

SECURE AREA

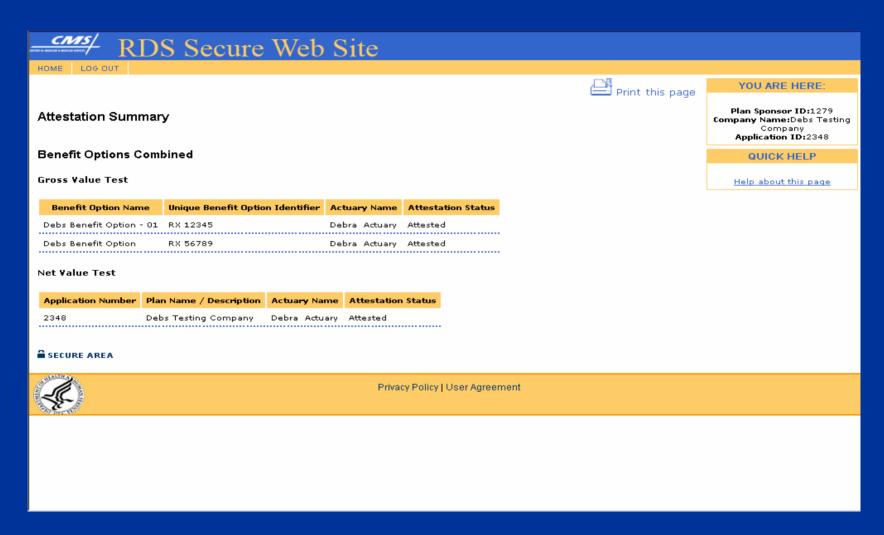
Continue Cancel



Privacy Policy | User Agreement



Completed Attestation Summary





Authorized Representative Registration



RDS Secure Web Site

Authorized Representative Registration

You have been assigned as an Authorized Representative to the following Plan:

Plan Sponsor Company Name: Debs Testing Company

Plan Sponsor ID: 1279

Please check the following box:

I agree that the Account
Manager {James Weber}
assigned to Plan Sponsor Id
{1279}, {Debs Testing
Company}, is an approved
agent for the Plan Sponsor.

View and print the agreement below

User Agreement

CENTER SECURE WEBSITE

You must read and accept the terms and conditions contained in this User Agreement expressly set out below and incorporated by reference before you may access the RDS Center Secure Website.

The RDS Center may amend this User Agreement at any time. Except as stated below, all amended terms shall automatically be effective 30 days after they are initially posted on the Site. This User Agreement is effective immediately.

Please check the following box:

I accept the User Agreement and Privacy Policy above

YOU ARE HERE...

- Authorized
 Representative
 Registration
- Authorized
 Representative
 Personal Information
- 3. Authorized Representative Login Information
- 4. Authorized Representative Summary
- 5. Thank You

QUICK HELP

Help about this page



Authorized Representative Personal Information

Authorized Representative Personal Information

An asterisk (*) indicates a required field.

To set up a Login ID for you to act as an Authorized Representative, we need additional information from you.

We ask for this information to protect and verify your personal identity, and that of the plan sponsor.

*First Name	
Middle Initial	
*Last Name	
Social Security Number	
*Date of Birth	Month ▼ Day ▼ Year ▼
*Job Title	
*Business Telephone	(ext.
Fax	
Mailing Address	
*Street Line 1	
Street Line 2	
*City	
*State	Select One
*Zip	

YOU ARE HERE...

- 1. Authorized Representative Registration
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QUICK HELP

Help about this page



Authorized Representative Login Information



RDS Secure Web Site

Authorized Representative Login Information

An asterisk (*) indicates a required field.

We ask for this information to protect and verify your personal identity, and that of the plan sponsor.

Choose your Login ID and password carefully.

- · Login IDs must be 8 to 15 characters
- · Login ID and Password cannot be the same
- · Password must be 8 characters in length
- · Password must be a combination of letters and numbers
- · Password must be lower case only (do not use mixed case)

*Login ID	
*Password	
Re-enter Password	

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QUICK HELP

Help about this page

The Security Questions allow you to regain account access if you forget your password. Please note the answers you provide to these questions should be actual answers and not hints for your password.

*Security Question 1	Select Security Question 1	•
*Answer 1		
*Security Question 2	Select Security Question 2	v
*Answer 2		



Authorized Representative Summary Page

Authorized Representative Summary

Please review your information...

The following information will be processed:

Authorized Representative Personal Information

First Name: Deb Middle Initial: Last Name: Weber

Social Security Number: 999-99-9999

Date of Birth: 03/04/1910

Job Title: Outreach Manager

Business Telephone: (999) 999-9999

Business Address

Street Line 1: one west penn

Street Line 2: City: towson State: MD Zip: 99999

Auth Rep Login Information

Login ID: debwebra

Security Question 1: What elementary school did you attend?

Answer 1: bishopville

Security Question 2: What city were you born?

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QUICK HELP

Help about this page

Answer 2: bishopville



Authorized Representative Thank You Page

Displays information submitted for AR

Next Steps:

- RDS Center validates AR personal information
- RDS Center AR Login ID
- Confirmation email sent to AR with link back to the RDS Center Web Site – 1 to 2 days after submission

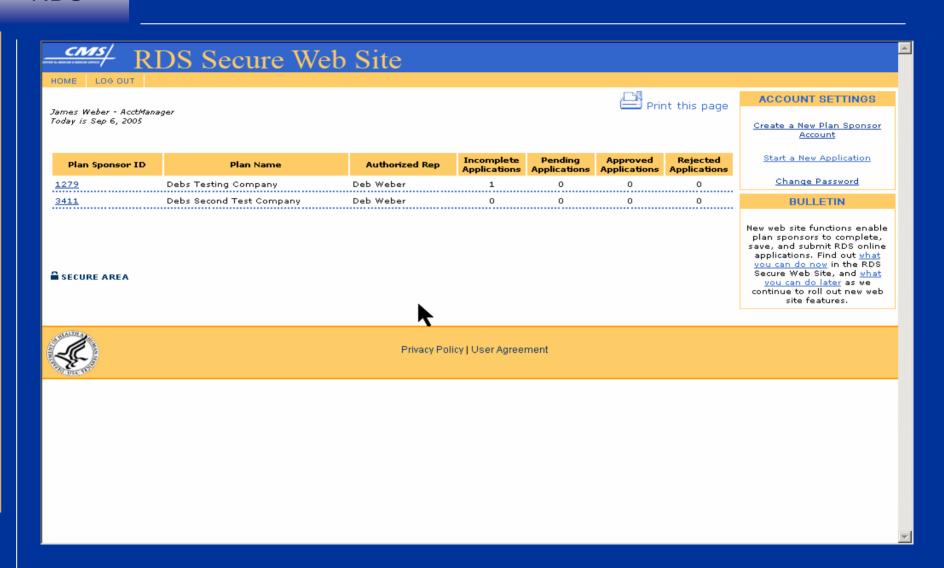


Plan Sponsor Agreement

- Required for each application
- Authorized Representative only
- Read and sign
- Answer security questions to validate signature
- Submit Application for processing by RDS Center
- Application can be submitted prior to Retiree List submission but will be put on hold until file received



Account Manager Home Page





Retiree Files



General Information

- A qualifying, covered retiree is considered eligible for the subsidy based on his/her Medicare entitlement
 - Part A entitled or Part B enrolled and
 - NOT enrolled in Part D
- An application must have at least one qualifying, covered retiree in order to be approved
- Only one file per application will be accepted
- There must be an Unique Benefit Option Identifier (e.g. Rx Group Number) for each benefit option associated with the plan
- Layouts on the RDS Center Web Site



Upload to RDS Secure Web Site

- Link to File Transfer Facility from RDS Secure Web Site
- Re-authentication with Login ID and password required – AR, AM, or designees granted upload permission
- Access mailbox by plan sponsor and application
- Comma delimited file
- Response and notification files can be downloaded
- Emails alerts when response and notification files available



Mainframe to Mainframe Via AGNS

- Technical Contact will work with RDS Center staff to set up (5 to 10 days with existing AGNS account, 30 to 45 days without)
- Using Connect:Direct over AGNS
- Response and notification files will be returned the same way
- Email alerts when response and notification files sent
- Fixed length flat files for retiree list and response files



Voluntary Data Sharing Agreements (VDSAs)

- Administered by the Medicare Coordination of Benefits (COB) contractor to enable CMS and employers to electronically exchange employee coverage information and Medicare entitlement information on a current basis to dramatically improve coordination of benefits between your Group Health Plan and Medicare.
- Will allow employers and insurers to coordinate new Part D benefit and provides alternative method for submission of monthly retiree files to the RDS Center for employers claiming the subsidy.



Initial Submission

- Include all retirees to be covered by the subsidy during the plan sponsor's plan year
- For plan years ending in 2006, the retiree list must be received by September 30, 2005
- For subsequent plan years, initial retiree lists must be received by RDS with the application 90 days prior to the start of the plan year
- A submitted application will not be processed until the retiree list has been received



Subsequent Monthly Submissions

- Should only include:
 - new retirees not reported to RDS previously
 - updates to previously accepted retiree records
 - deletions for previously accepted retiree records
 - Resubmissions
- Submitted monthly based on file transmission method selected on your application



Submitted Data Elements

- Submitted Data Elements (per Retiree)
 - Application ID
 - SSN and/or HICN
 - First Name
 - Middle Initial (optional)
 - Last Name
 - Date of Birth
 - Gender
 - Coverage Effective Date
 - Coverage Termination Date (optional)
 - Unique Benefit Option Identifier (e.g. Rx Group Number)
 - Relationship to Retiree
 - Action Type of Record (Add, Update, or Delete)



Response Data Elements

- Response File Data Elements (per Retiree)
 - Application ID
 - SSN and/or HICN
 - First Name
 - Middle Initial
 - Last Name
 - Date of Birth
 - Gender
 - Coverage Effective Date
 - Coverage Termination Date
 - Unique Benefit Option Identifier (e.g. Rx Group Number)
 - Relationship to Retiree
 - Action Type of Record (Add, Update, or Delete)
 - Subsidy Approval Indicator (Y or N)
 - Reason Code
 - Subsidy Effective Date
 - Subsidy Termination Date



Subsidy Periods

- Response records will indicate actual period(s) for which subsidy can be claimed
- Due to dates for Medicare Part A entitlement, Part B or D enrollment, subsidy period may not cover entire plan year
- Multiple response records indicating valid subsidy periods may be sent per retiree



Notifications

- Same response file layout using reason codes
- Email notification of file for transfer
- Retiree tries to enroll in Part D and initially rejected
 - Outreach/education
 - No change to subsidy period
- Retiree overrides rejection and signs up for Part D
 - Subsidy period terminated as of Part D effective date
- Changes to Retiree Part A entitlement or Part B enrollment
 - Changes to subsidy period dates will be sent for terminations and period shortening
 - Messages to resubmit retiree in other cases



Response File Reason Codes

- 01 Application did not meet filing deadline
- 02 Invalid Application ID
- 03 Invalid Retiree last name
- 04 Invalid Retiree first name
- 05 Invalid Retiree date of birth
- 06 Invalid Retiree gender
- 07 Invalid Retiree coverage effective date
- 08 Invalid Retiree coverage termination date
- 09 Invalid Retiree unique benefit option identifier
- 10 Enrolled in Part D
- 11 Not eligible for Medicare
- 12 Beneficiary is Deceased
- 13 Invalid HICN or SSN
- 14 Termination date is less then effective date
- 15 Missing Trailer record
- 16 Not a valid Medicare Beneficiary



RDS Application Processing

Behind the Scenes



Application Processing

An application will be reviewed and approved based on the following requirements:

- Plan Sponsor is determined to be a valid entity
- At least one qualifying covered retiree for which the Plan Sponsor is claiming subsidy is eligible
- Bank Account was validated
- No RDS system users involved in the application process were found to be debarred according the General Services Administration Debarment List or convicted of fraud or abuse per the Office of Inspector General Exclusion List



Application Processing (cont.)

In addition:

- Actuary(s) attesting to actuarial equivalence is a qualified member of the American Academy of Actuaries
- Meets timely filing requirements 90 days prior to the beginning of the plan year unless an extension was granted, or an extension was requested and granted



Contact Us

- http://rds.cms.hhs.gov
- (877) RDS-HELP or
- (877) 737-4357
- (877)RDS-TTYO or
- (877) 737-8890



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